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Proceedings of the Pastaria Festival 2019. Gourmet Pasta with Geographical Indication

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Here is a brief summary of Giovanni Peiras's contribution at the conference *Product innovation: from tradition to the market*, held at the Pastaria Festival 2019.

The Italian food market, including pasta, is seeing the emergence of two trends. The first is linked to the new dietary styles of consumers. Since the first “Report on Italian eating habits” by Censis, there has been talk of food polytheism, or rather a food paradigm pushing consumers (especially Millennials and Generation Z) to contaminate styles and foods fuelled by curiosity and experimentation and seeking to pay greater attention to more responsible consumption which is attentive to health, ethics and sustainability. The second trend concerns the behaviour of companies operating in the pasta sector which, in order to respond to these new styles of consumption, are focusing strategies on product innovation and diversification (such as wholemeal pasta, organic pasta, special pasta made with legume flour, gluten-free pasta, fast-cooking pasta and 3-D printed pasta).
The latest available data shows that world pasta production has risen from 9 million tons (1998) to almost 15 million tons (2018). The main pasta manufacturing country is still Italy, producing over 3.3 million tons of pasta, more than half of which is exported, mainly to the United States, France, Germany and the United Kingdom. Production turnover amounts to €4.8 billion.
Among the types of pasta on the market, one segment that is gaining more and more interest from the players in the pasta supply chain is the specialities, gourmet products marketed in the high-end range which also include certified pasta with Geographical Indication.
The European Union has already established three certified quality schemes since 1992, currently governed by EU Regulation no. 1151/2012. Protected Designation of Origin (PDO) goods are those products strictly associated with the specific territory from which they take their name and must meet three requirements: originating in a specific place, region or country; product quality and characteristics derived essentially or exclusively from a particular geographical environment and its natural or human factors; production phases must take place in the defined geographical area.
Protected Geographical Indication (PGI) on the other hand is used for products connected to a specific territory; this link is less stringent than with PDO products and relative territorial area. These products must meet three conditions: originating in a specific place, region or country; a given quality, reputation or other characteristics essentially attributable to the geographical region; at least one of the production phases must take place in the indicated territorial area.

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Alongside the PDO and PGI Geographical Indications, the other sign of quality is the Traditional Speciality Guaranteed (TSG), aimed at agricultural and food products that have a “specific” production or composition (i.e. different from other similar products) and are “traditional” (i.e. existing for at least twenty years), even if not necessarily produced solely and exclusively in that area.
Geographical Indication is the link between a typical product and a geographical name on the basis of which legal protection is applied to the product in the form of a distinctive mark that expresses this link and certifies it to consumers. Therefore the value of the geographical indication summarizes a multiplicity of needs: the conservation and promotion of the gastronomic, historical, cultural and economic identity of local communities; biodiversity; the collective dimension with “know-how” shared on a local level; protection against counterfeiting and illegal use.
The EU’s Door database shows that at the end of 2019 there were 1460 Geographical Indications on a European level: 642 PDOs, 756 PGIs and 62 TSGs. In terms of product class, the most numerous are fruit and vegetables (390), cheeses (239) and meat products (181). At an individual country level, Italy has the highest number of Geographical Indications registered (299): 167 PDOs, 130 PGIs and 2 TSGs, of which 112 are for fruit and vegetables, 52 for cheeses, 46 for oils and 43 for meat products. The production value, according to Qualivita estimates (2017), is approximately €7 billion, with a consumer value of around €15 billion and an export value of €3.5 billion euros.

MACCHINE ED IMPIANTI PER PASTA

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Together, Geographical Indications have achieved a good response on the market, albeit with some grey areas. On the one hand, there are certainly a number of positive aspects, such as the increase in production volumes, the consolidation of market shares and the penetration into new distribution channels; but on the other hand there are also some negative factors, such as the increase in competition between specialities and a reduction in operating margins. The Geographical Indications market is heavily polarized into two large product clusters. In the first, four fifths of market turnover is achieved by about ten geographical indications, such as Parmigiano Reggiano cheese (€1.3 billion), Grano Padano cheese (€1.293 billion) and Prosciutto di Parma (€890 million). The second cluster includes many indications of small-medium size, which struggle to promote themselves outside their own production area and achieve any real economic significance, despite having a major role in the context of local development.
Among the product classes envisaged by the quality scheme regulations, to date only 10 PGI pasta products have been registered, including 2 French pastas “Pâtes d’Alsace IGP” (2005 - year of registration on the Door portal) and “Raviole du Dauphiné IGP” (2010), 2 German pastas “SchwäbischeMaultaschen IGP” (2009) and “SchwäbischeSpätzle IGP” (2012) and one Chinese pasta, “LoungkouFen Si” (2010). Italy can boast of five pastas of excellence: “Pasta di Gragnano IGP” (2013), “Maccheroncini di Campofilone IGP” (2013), “Cappellacci di zucca ferraresi IGP” (2016), “Pizzoccheri della Valtellina IGP” (2016) and “Culurgionis d’Ogliastra IGP” (2016). From the latest Qualivita report, it is clear that there has been a continuous growth in the production of certified pastas, reported to be around 32,600 tons (2017), including 30,800 tons of “Pasta di Gragnano IGP”, with a production value of approximately €114 million, 75% of which is generated in foreign markets, 1,657 tons of “Pizzoccheri della Valtellina IGP”, 53 tons of “Maccheroncini di Campofilone IGP” and 50 tons of Cappellacci di zucca ferraresi IGP”
The market for pasta in recent years has shown great vitality in terms of differentiation and innovation, and the certified Geographical Indication gourmet pasta segment could be seen as a testing ground.
The Italian pasta manufacturing model is recognized the world over and represents excellence not only in the classic pasta shapes but also for the dozens of very varied types of pasta known only at a regional level.